BY ORDER OF THE COMMANDER AIR FORCE RESERVE COMMAND



AIR FORCE RESERVE COMMAND HEADQUARTERS OPERATING INSTRUCTION 36-112

11 December 1996

Personnel

PROCESSING HQ AFRC PERSONNEL ACTIONS

COMPLIANCE WITH THIS PUBLICATION IS MANDATORY

NOTICE: This publication is available digitally on the HQ AFRC WWW site at: http://www.afrc.af.mil and the AFRCEPL (CD-ROM) published monthly.

OPR: HQ AFRC/DPCE (Mary E. Arterburn)

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(Col Gary L. Shoemaker)

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This operating instruction implements AFPD 36-1, *General Civilian Personnel Provisions and Authorities*, and assigns HQ AFRC Civilian Personnel Division (DPC) as the focal point to assist heads of AFRC staff offices in conducting civilian personnel management matters with the WR-ALC Civilian Personnel Office (78 SPTG/DPC). It outlines selecting supervisors' responsibilities to ensure accomplishment of Equal Employment Opportunity (EEO)/Affirmative Employment Program (AEP) objectives. It also outlines procedures for administrative control of all Standard Forms (SF) 52, **Request for Personnel Action**, initiated within this headquarters for processing by the 78 SPTG/DPC. It applies to all HQ AFRC staff agencies, 951 RSPTS, 952 RSPTS, and 78 SPTG/DPC.

SUMMARY OF REVISIONS

This is the first publication of HOI 36-112, substantially revising HOI 40-4. It updates, clarifies, and streamlines previous guidance on procedures and responsibilities for processing HQ AFRC personnel actions and accomplishing EEO/AEP objectives.

- 1. Responsibilities. All personnel action requests, SFs 52, initiated within this headquarters are subject to procedures Grade/Job in this instruction. HQ AFRC/DPCE is the focal point for controlling and processing all SFs 52 and monitoring selections for headquarters EEO/AEP objectives. Supervisors are encouraged to have direct contact with representatives of the 78 SPTG/DPC on civilian personnel matters. However, HQ AFRC/DPCE serves as the liaison between AFRC staff agencies and the 78 SPTG/ DPC to assist, when requested, supervisors of civilian employees in resolving problematic or complex civilian personnel management matters of a staffing/recruitment nature.
- **2. Actions Covered.** Actions covered by this instruction include all personnel and position actions (see attachment 1 for a list of frequently requested personnel and position actions).

3. Preparing and Processing SFs 52:

- 3.1. Prepare SFs 52 according to AFPAM 36-107, *Personnel Position Actions* and *The Guide to Processing Personnel Actions* (old FPM 296-33). Most entries on the SF 52 are self-explanatory, but some items require special emphasis (see attachment 2 for general guidelines for preparation of SFs 52 by supervisors and attachment 3 for a sample of a completed SF 52). Ensure information is complete and accurate. The mechanized Defense Civilian Personnel Data System (DCPDS) will not accept a personnel action request with incomplete data. Additional guidance applicable to organizations serviced by the 78 SPTG/DPC is contained in WR-ALC-RAFB Sup 1 to AFR 40-296 (AFR 40-296 has been replaced by AFPAM 36-107; WR-ALC-RAFB Sup 1 is currently being revised).
- 3.2. The originating office forwards the SF 52 to HQ AFRC/DPCE, HQ AFRC/XPMX, and HQ AFRC/FMAPH, in turn, before sending it to the appropriate 78 SPTG/DPC office (that is, separation, disciplinary, and leave without pay actions go to DPCE, all other actions go to DPCPP). HQ AFRC/DPCE maintains a log and an updated Position Control Register of all personnel actions initiated within this headquarters. Each SF 52 received from an operating official is logged in, reviewed, and after coordination, forwarded to the appropriate 78 SPTG/DPC office for action. HQ AFRC/XPMX reviews for position authorization, functional responsibility accuracy, and verifies (correcting/adding if necessary) the Personnel Accounting (PAS) Code, Program Element Code (PEC), Air Force Specialty Code (AFSC), and Organizational Structure Code (OSC). HQ AFRC/FMAPH reviews the SF 52 to ensure adequate funds are available to staff the position.
- 3.3. The appropriate 78 SPTG/DPC office routes SFs 52 being returned to the initiating supervisor without action through HQ AFRC/DPCE to ensure the headquarters SF 52 log and Position Control Register are posted.
- 3.4. When the impact of an SF 52 action could result in an excess/surplus headquarters employee (for example, upgrading/canceling an encumbered position, etc.), the SF 52 is routed via AF Form 1768, **Staff Summary Sheet**, through HQ AFRC/DPCE to AFRC/CS for approval/disapproval. In addition, in light of initiatives to reduce high-grade positions, fill actions for GS-14/15 (including GS-13 target 14 positions) are routed via AF Form 1768 through HQ AFRC/DPCE to AFRC/CS for approval/disapproval.
- 3.5. After requested actions are effected, all SFs 50-B, **Notification of Personnel Actions**, processed by 78 SPTG/DPC are routed to HQ AFRC/DPCE so the SF 52 log and Position Control Register can be posted to show action taken on each request.
- 3.6. HQ AFRC/DPCE annotates the SF 52 log and Position Control Register and routes a copy of the SF 50-B to HQ AFRC/FMAPH for building the accounting classification data required for the Defense Civilian Payroll System.
- 3.7. HQ AFRC/DPCE forwards the original SF 50-B to the employee's immediate supervisor for posting of the employee's AF Form 971, **Supervisor Employee Brief**, and routing to the employee.
- **4. Selection of Personnel.** Supervisors ensure positions are filled based on merit and qualifications without discrimination because of race, color, religion, sex, national origin, age, marital status, disability, political affiliation, or any other non-merit factors. Consistent with Equal Employment Opportunity Commission (EEOC) and Office of Personnel Management (OPM) requirements, the headquarters develops an EEO/AEP which represent minorities, women, and persons with disabilities at all grade levels, in every employment category, and in every major organizational element. Air Force EEO/AEP policies and

guidance are contained in AFPD 36-2, *Employment and Affirmative Action*, and AFI 36-2024, *Staffing Civilian Positions*.

- 4.1. Selection of the best qualified candidate is critical to the efficient operation of this headquarters. Selections are made in conjunction with our EEO/AEP objectives. Selecting officials must be aware of their current work-force composition and specific areas of underrepresentation of minorities and women. They must also be aware of those specific job categories which the organization has targeted for affirmative action efforts. The servicing staffing specialist in 78 SPTG/DPC and HQ AFRC/DPCE counsel selecting officials where underrepresentation of minorities or women exists and discuss alternate recruiting methods when appropriate to assist in the accomplishment of EEO/AEP objectives.
- 4.2. The 78 SPTG/DPC forwards an appropriate certificate of eligibles to the selecting official with EEO/AEP data attached (that is, EEO/AEP support memo from AFRC/CV, HQ AFRC work-force composition, candidate qualification comparison matrix sample, etc.). HQ AFRC/DPCE provides the EEO/AEP data packages to 78 SPTG/DPC for dissemination.
- 4.3. Selecting officials review certificates and make selections according to WR-ALC-RAFB Sup 1 to AFR 40-335, and paragraph 4.3.1 and paragraph 4.3.2 of this operating instruction. (AFR 40-335 has been replaced by AFMAN 36-203; WR-ALC-RAFB Sup 1 is currently being revised).
 - 4.3.1. Certificates for tentative selection for positions at GS-11 and below are routed through HQ PC.
 - 4.3.2. Certificates for tentative selection for positions at GS-12/13 (or positions with an established target grade of GS-12 which are being filled at a lower grade, for example, GS-11 target GS-12) are reviewed by AFRC/CS. AFRC/CV reviews selections/promotions for GS-14/15 (including positions with an established target grade of GS-14). Selecting supervisors ensure tentative selection certificates that require review by AFRC/CS or AFRC/CV include a candidate qualification comparison matrix (Attachment 4) and a staff summary sheet (Attachment 5) with rationale for the tentative selection. Rationale should be discussed in terms of requirements of the positions such as experience, educational background (if applicable), underrepresentation in organization, training, and any other related selection factors. The staff summary sheet is forwarded through the appropriate directorate, through HQ AFRC/DPCE and to AFRC/CS or CV, as appropriate.
 - 4.3.3. Selecting officials will not commit themselves, an employee, or the command to a selection before receipt of notice that the review has been completed and approved.
 - 4.3.4. Selecting supervisors observe suspense dates placed on certificates by 78 SPTG/DPC and/or by the ALC Master Labor Agreement where applicable. In order for a personnel action (promotion, reassignment, etc.) to be effective the next pay period, 78 SPTG/DPC must have the SF 52 or certificate, whichever is appropriate, by 1000 at the latest, 1 week prior to the beginning of the proposed effective pay period.
- 4.4. Employee Requested Reassignments/Change to Lower Grade (CLG). Employees wishing to be considered for a reassignment or CLG, including reassignments/CLGs for positions located at HQ AFRC, must submit a WR-ALC Form 78, **Request for a Reassignment/Change to Lower Grade/Job Sharing**, through their supervisory chain of command to 78 SPTG/DPC. WR-ALC Form 78 is available on the command local area network (LAN).

- 4.5. Management Initiated/Directed Reassignments/CLGs. There are several methods for filling a position with reassignment/CLG candidates.
 - 4.5.1. Supervisors wishing to consider all available and qualified reassignment/CLG candidates may do so by submitting a fill SF 52. The 78 SPTG/DPC will then automatically issue a list of reassignment/CLG candidates when they issue the list of eligible promotion candidates.
 - 4.5.2. Supervisors wishing to consider a specific CLG candidate or reassign a specific employee into their vacant position without receiving a list of reassignment/promotion eligibles must:
 - 4.5.2.1. If the desired reassignment/CLG is into a bargaining unit position, contact HQ AFRC/DPCE to obtain the union's coordination prior to advertising vacant position. After union's coordination is obtained, advertise the position via the command's E-Mail and solicit Headquarters' reassignment/CLG candidates (see attachment 6 for a sample E-Mail soliciting reassignment/CLG candidates). Once the names of the potential reassignment/CLG candidates are obtained, make tentative selection and contact the servicing staffing specialist in 78 SPTG/DPC to ensure tentative selectee is qualified. After qualifications have been verified, submit SF 52 containing name of selectee. The employee must have a WR-ALC Form 78 on file with the 78 SPTG/DPC. Although the losing supervisor has already concurred with the employee's request for reassignment consideration when they concurred on the WR-ALC Form 78, the gaining supervisor should notify the losing supervisor of the proposed action as a courtesy.
 - 4.5.2.2. If the desired reassignment/CLG is into a non-bargaining unit position, contact the servicing staffing specialist in 78 SPTG/DPC to ensure tentative selectee is qualified. After qualifications have been verified, prepare a reassignment/CLG SF 52 containing name of selectee. If the gaining supervisor does not have jurisdiction over both the gaining and losing position, obtain the losing supervisor's coordination on the SF 52 in block 14. These reassignment candidates do not have to have a WR-ALC Form 78 on file with 78 SPTG/DPC. However, CLG candidates must submit a WR-ALC Form 78 to 78 SPTG/DPC agreeing to the voluntary CLG.

DAVID S. SIBLEY, Brig Gen, USAFR Assistant Vice Commander

FREQUENTLY REQUESTED PERSONNEL AND POSITION ACTIONS Management Personnel Action Request.

ACTION	REFERENCE	REMARKS
Fill Position	AFMAN 36-203	May be accomplished by: 1) Adding new employees on the rolls through appointment, reemployment, etc., or
		2) Moving current employees by: Restoration Promotion Reassignment Change to Lower Grade (the CPF/O determines action after employee has been selected)
Detail	AFMAN 36-203, 5 C.F.R.	
Nonduty/Nonpay Status	AFI 36-704	Suspension for disciplinary reasons.
Return to Duty	The Guide to Processing Personnel Actions (old FPM 296-33)	Used to return an employee to the active rolls from nonduty or nonpay status.
Change in Hours	AFI 36-807	Used to change the number of hours a part-time employee is scheduled to work.
Change in Work Schedule	AFI-36-807	Used when the work schedule changes; for example, from part-time, from intermittent to part-time.
Separation	FPM Sup 351-1, AF Sup (AFI in drafting) AFI 36-1001 AFI 36-3212 AFI 36-809 AFI 36-704 AFI 36-704 CSRS/FERS/Handbook for Personnel and Payroll Offices	Reduction-In-Force Transfer of Function Performance Medical Reasons Death Disciplinary Actions Adverse Actions Retirement
Mgmt Position Action Requests		
Establish	The Guide to Processing Personnel Actions	Used to establish a new position or one identical to a position already established.

Review	The Guide to Processing Personnel Actions	Used when the duties or responsibilities of a position have changed significantly.
Cancel		Used when the position is no longer needed or to meet directed changes in manpower authorizations.
Change is Position Sensitivity	AFPD 31-5	Used only when sensitivity of the position changes and not for other changes that occur.
Employee Personal Action Requests		
Reassignment or Reduction in Grade or Pay	AFMAN 36-203	Request must be from employee in writing.
Separation	The Guide to Processing Personnel Actions	Included are: Resignation Retirement Movement from an Air Force activity Separation from military service
Actions on Career Program covered Positions	AFI 36-601	Used when these are variations of position actions because they are covered by career programs.

Attachment 2

GENERAL GUIDELINES FOR PREPARATION OF SF 52 BY SUPERVISORS

ITEM#	INSTRUCTIONS
PART A	
1. Action Requested	Kind of personnel position action desired, for example, fill, detail, reassign, suspend, leave without pay (LWOP), return to duty, position review, etc., as applicable. If appropriate, indicate in parenthesis who position is vice.
2. Request Number	Consists of office symbol and sequential number. Begin each number with the current FY and number consecutively and end with an M ($M = AFRC$) (that is, DPCE 961M).
3. For Additional Information	Name and telephone extension of the person who is familiar with the action and can furnish additional information if required.
4. Proposed Effective Date	Date on which action is desired. For resignations, enter date employee selects. (see note 1)
5. Action Requested By	Self-explanatory. (Do not complete on employee-requested actions).
6. Action Authorized By	Name, title, and signature of the person authorized to approve the personnel action request and approval date.
PART B	
1. NAME	Name as shown on AF Form 971, Supervisor's Record of Employee. Complete on all actions affecting employees. Leave blank on fill requests. For name change, show present name under this item; show former name under Part D (see note 2).
2. SSN	As shown on AF Form 971
3-6.	LEAVE BLANK
7. Position Title and Number	Obtain from AF Form 1378, OF 8, or AF Form 1003 (see note 3).
_	Enter pay plan, occupational series, and grade level shown on
tional Code	AF Form 1378, OF 8, or AF Form 1003, for example: WG-8852-10 or
	GS-0301-04 (see note 3).
10. Grade or Level	Self-explanatory.
11-13.	LEAVE BLANK
14. Position's Organization	Enter the major command, office symbol, Organizational Structure Code, comparable level organization and lower organizational levels as needed. (Abbreviations, symbols and numbers may be used if readily understood by all concerned (for example, HQ AFRC/DPC, Directorate of Personnel, Civilian Personnel Division (see note 3).

15. Position Title and Number	Follow instructions for item 7. If the request is for establishment of new position, enter proposed title (see note 4).
16-17. Pay Plan and Occupational Code	Follow instructions for items 8 and 10. Leave blank if position is not established (see note 4).
18. Grade or Level	Self-explanatory.
19-21.	LEAVE BLANK
22. Name and Location Organization	Employing Office. Follow instructions for item 14 (see note 4).
23-35.	LEAVE BLANK
36. Appropriate Code	Enter AFSC, Program Element Code, Personnel Accounting Symbol, and Organizational Structure Code.
37-38.	LEAVE BLANK
39. Duty Station	Robins AFB; Houston County, GA
40-51.	LEAVE BLANK
PART C	
1. A-C	List in following order:
	HQ AFRC/DPCE, HQ AFRC/XPMX, HQ AFRC/FMAPH
	78 SPTG/DPCPP or DPCE (that is, separations, disciplinary, and leave without pay actions go to DPCE; all other actions go to DPCPP).
PART D	
Remarks by Requesting Office	Enter any additional information needed to explain the requested action. For example:
	Position Sensitivity requirements.
	Special conditions of employment.
	Limitations on length of employment.
	Information about the position to be filled.
	Special physical requirements.
	Indicate new work schedule or change in the number of hours
	scheduled to work.
	Reasons for temporary actions.

*NOTES:*1. As a general rule, the effective date may not be earlier than the date on which the appointing officer approved the action. See *The Guide to Processing Personnel Actions* (old FPM 296-33) for exceptions to this rule.

- 2. An employee may use either a SF 52 or a memorandum to submit a request for a name change.
- 3. Complete when the requested action moves the employee from the position; that is, separation, change action which places the employee in a nonpay status, action which moves employee to another position. Leave blank on fill requests.
- 4. Complete on all actions except those which move an employee from the position (see note 3).
- 5. For fill actions (for example, fill, reassignment, change to lower grade, etc.) attach one copy of the AF Form 1003, Air Force Core Personnel Document, or two copies of the AF Form 1378, Civilian Personnel Description, as appropriate.

SAMPLE SF 52, REQUEST FOR PERSONNEL ACTION

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CONTINUED ON REVERSE SIDE
52-119 *Separation, disciplinary, and leave Without pay route to DPCE;

all other actions route to DPCPP.

CANDIDATE QUALIFICATION COMPARISON

Since Dully was selected over Burns, Carns, and Evans (and selected for a higher grade over Adams and Faust), show exactly how Dully was better qualified, rather than stating the others were lacking in the category of experience, education, specific qualifications, previous supervisory experience, etc. The Candidate Qualification Comparison Matrix (sample below) should show how each candidate was rated against the job requirements/knowledge skills and abilities (KSA) and validate your selection based on objective job criteria. Assign a simple + for each desired criteria the candidates' possess, then add up all the +s to see who has the highest total; or whatever logic you wish to use that's supportable. Take into consideration such things as: (1) What are the critical KSAs?; (2) What are the critical job elements from the AF Form 860, Civilian Performance and Promotion Appraisal?; (3) What skills are identified in the position description (PD) core document?; (4) What skills are identified in the highest progression level factors (PLF)?; (5) etc.

SAMPLE MATRIX

Lead Firefighter	Adams	Burns	Carns	Dully	Evans	Faust
GS-0081-07						
Education Level:	<1 Yr	None	<1 Yr	AA.Deg	None	None
(Above High School)	+	0	+	+	0	0
Structural Experience:	+	+	+	+	+	+
(KSA #2 Airfield Experience and PD)	0	+	+	+	+	+
EMT: (PD-Skills Code)	+	0	+	+	+	+
Hazardous Material Tng:	+	+	+	+	0	+
(KSA #2)						
Supervisory Experience:	0	0	0	+	0	+
(Element #1 & KSA #1)						
Vehicle Insp/Preventive	+	+	+	+	+	+
Maint: (Element #3)						
Preparing Fire Dept Reports	0	0	0	+	0	0
(Written Communication):						
(Element #4 & KSA #4)						
Develops Lesson Plans and	+	0	0	+	+	+
Trains Crew Members:						
(Element #2 & KSA #4)						

Formal Fire Fighting Training:	+	+	+	+	+	+
(KSA #3)						
Recognition/Awards	+	0	0	+	+	0
Relating to Firefighting						
TOTALS:	8	5	7	*11	7	8

^{*} Mr. Dully was selected for the GS-0081-07 position.

Factors to keep in mind:

- (1) Can use adjective appraisal (that is, excellent, superior, etc.); but can't use numerical rating. The numerical points for appraisals is already factored in the Promotion Placement Referral System (PPRS), so you can't use the same criteria twice.
- (2) Awards are also used in PPRS, but since the employee only gets a maximum of 3 points, you can use that criteria further. However, the awards must be related to the job you are filling (that is, if filling a job in Logistics, a suggestion award for repairing the ceiling would not be related to the position being filled; but a logistics award would be related). You would also want to look at recency of the award; was it 10 years ago or was it last year?
- (3) If the position is not a supervisory position, supervisory experience would not be a factor.
- (4) When reviewing education, take into consideration what the degree is in (that is, for a job in accounting, a BA in accounting would weigh heavier than a MA in anthropology).
- (5) Be cautious when using number of years of experience because a person that has hit nails for 10 years is not necessarily better qualified than a person that has hit nails for 1 year. NOTE: Can use numerical points versus + and 0 if you define the weight of your point system.

SAMPLE AF FORM 1768, STAFF SUMMARY SHEET

				STAFF SUM	MA	ARY SHEET	Г			
611	то	ACTION	SIGNATURE (Surne	me), GRADE AND DATE		то	ACTION	SIGNAT	URE (Surne	me), GRADE AND DAT
1	DPCE	Coord			6					
2	CVEA	Log			7		,			
3	CVE	Coord			8					
4	cs	Coord			9					
5	cv	Appr			10					
su	RNAME OF A	CTION OFFICER	AND GRADE	SYMBOL	_	PHONE		TYPIST'S INITIALS	SUSPENS	SE DATE
C	ol Jones			CE		71339		mea		
Г	entative S	Selection of	Jane Doe for	the Assistant Ge	ner	al Engine	er, GS-80	1-14, Po	osition	DATE

1. PURPOSE: To obtain AFRES/CV approval of the tentative selection of Ms. Jane Doe for The Assistant General Engineer, GS-0801-14, position in CE.

2. DISCUSSION:

SUMMARY

- a. Position Requirements: A brief description of the major position duties and responsibilities.
 Address experience, educational background (if applicable), training, etc., required.
- b. Underrepresentation in Organization: Representation as it compares to the local Civilian Labor Force (CLF) or National CLF, whichever is appropriate. If position is normally filled through local recruitment, use the local CLF; if position is normally filled through national recruitment (e.g., career program positions), use the National CLF. Refer to HQ AFRES work-force composition data issued with the certificate(s).
- c. Protected Group Data: Indicate number of persons referred and how many are members of a protected group (i.e., minority, female, or disabled employee).
- d. Affirmative Employment Plan Objective: If known, indicate whether the tentative selectee is a member of a protected group.
- e. Tentative Selectee Data: Attach a copy of the Candidate Qualification Comparison Matrix and based on objective criteria, explain why selectee is considered the best qualified candidate.
- 3. RECOMMENDATION: CV approve tentative selection.

JOHN JONES, Col, USAF The Civil Engineer

- 3 Tabs
- 1. Certificate(s)
- Work-Force Composition
 Candidate Qualification
 - Comparison Matrix

SAMPLE E-MAIL SOLICITING REASSIGNMENT/CLG CANDIDATES

To : *@951_rspts*@robins,*@952_rspts*@robins,*@hq_afres*@robins

From : Bobbie Sellers @HQ AFRES DON@ROBINS

Subject : DON Vacancy

Date : Wednesday, September 4, 1996 at 1:48:48 pm EDT

Attachment : (none) Certify : N

In the near future, we will be filling a vacant GS-318-06, Secretary (Steno), located in DON. Before sending a fill action to Civilian Personnel, we are interested in giving other qualifying GS-06s an opportunity to identify their interest in this position. This would be a lateral opportunity, so only GS-06s need apply. If you are interested, please discuss with your supervisor, then contact Col Robert Cox, at 7-1704, NLT 10 Sep 96. Also make sure you have a WR-ALC Form 78 on file with the base CCPO. This action has been coordinated with HQ AFRES/DPCE, in turn, with the labor union representative.